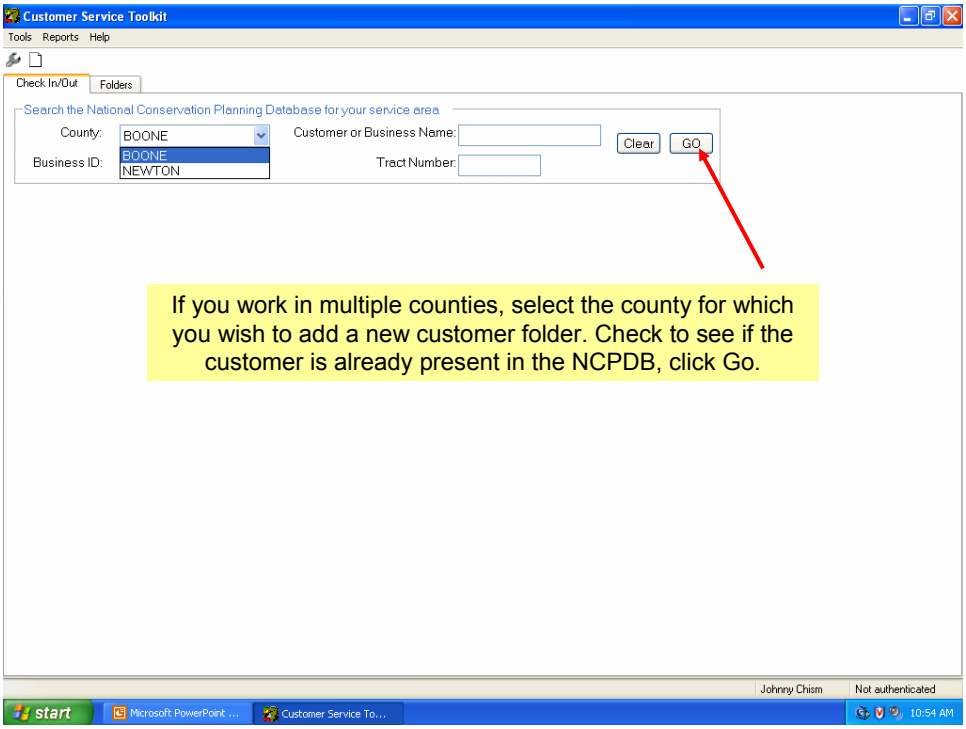
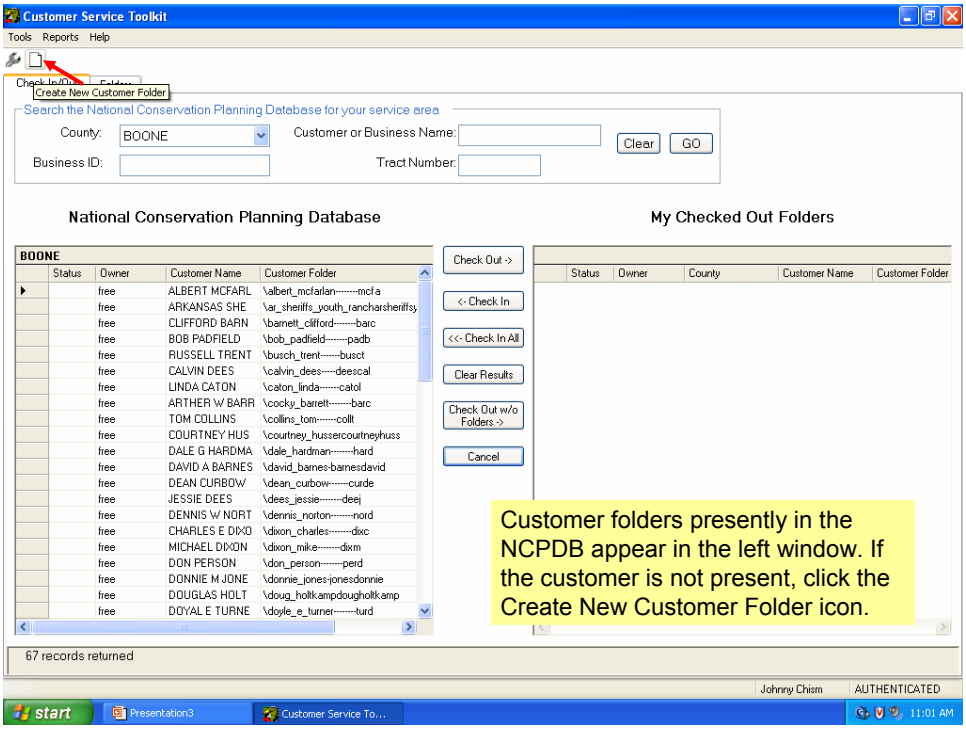
Creating a New Customer Folder

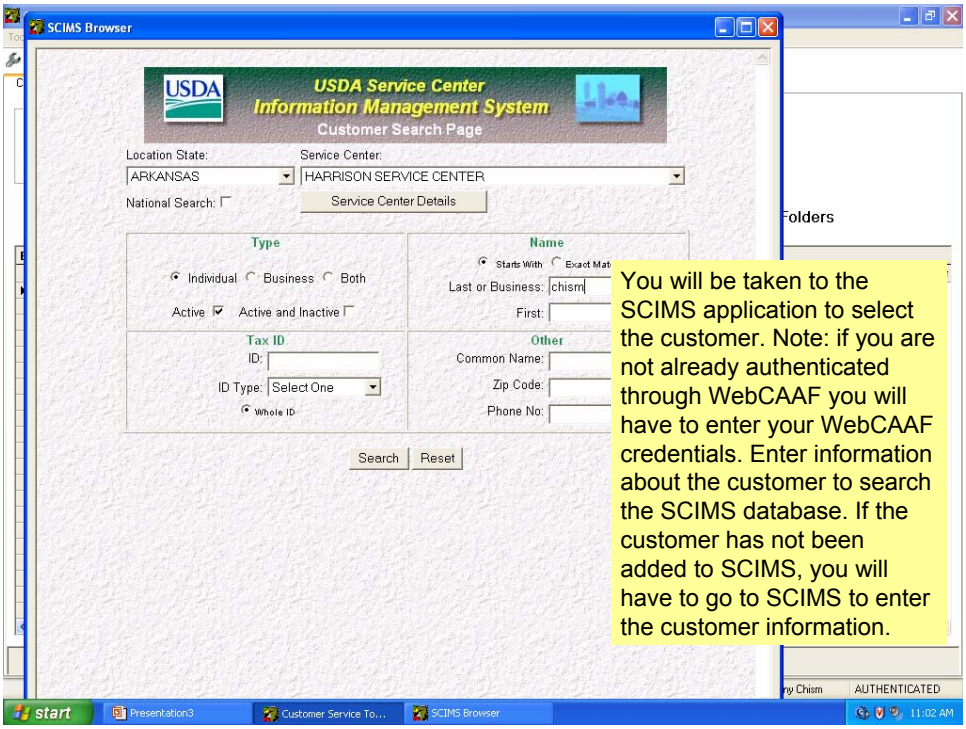
Toolkit 2004



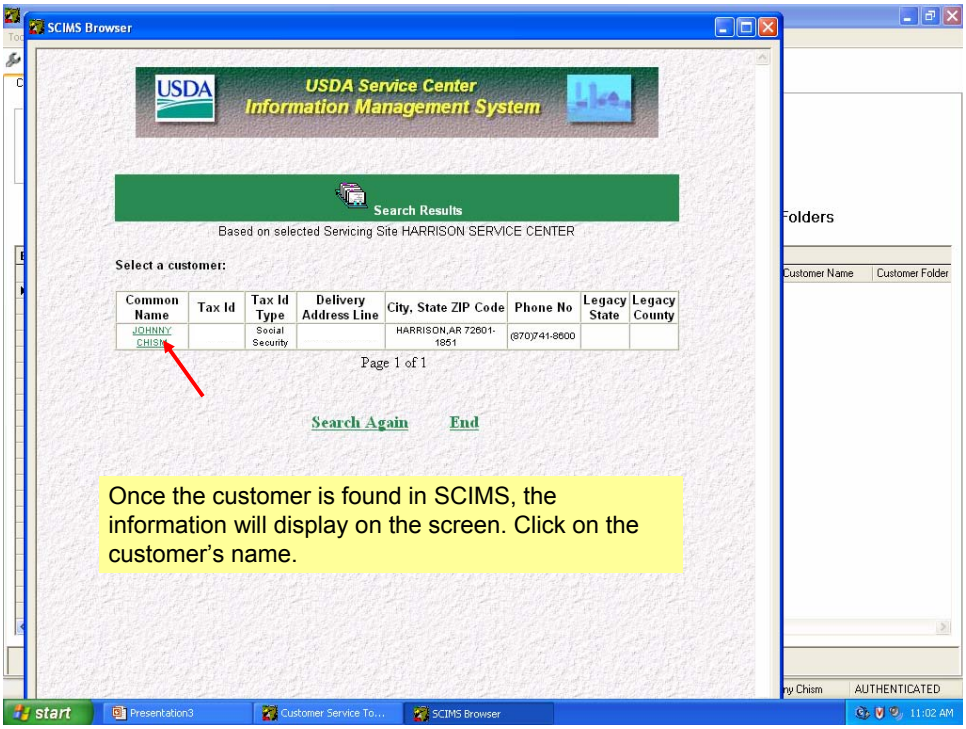
If you work in multiple counties, select the county for which you wish to add a new customer folder. Check to see if the customer is already present in the NCPDB, click Go.

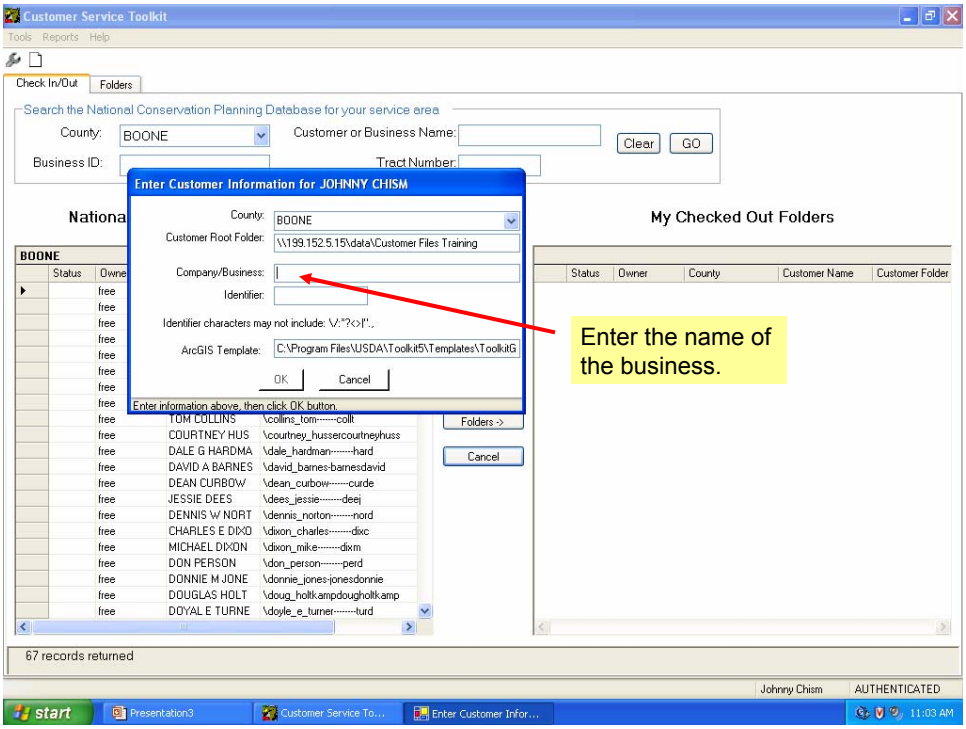


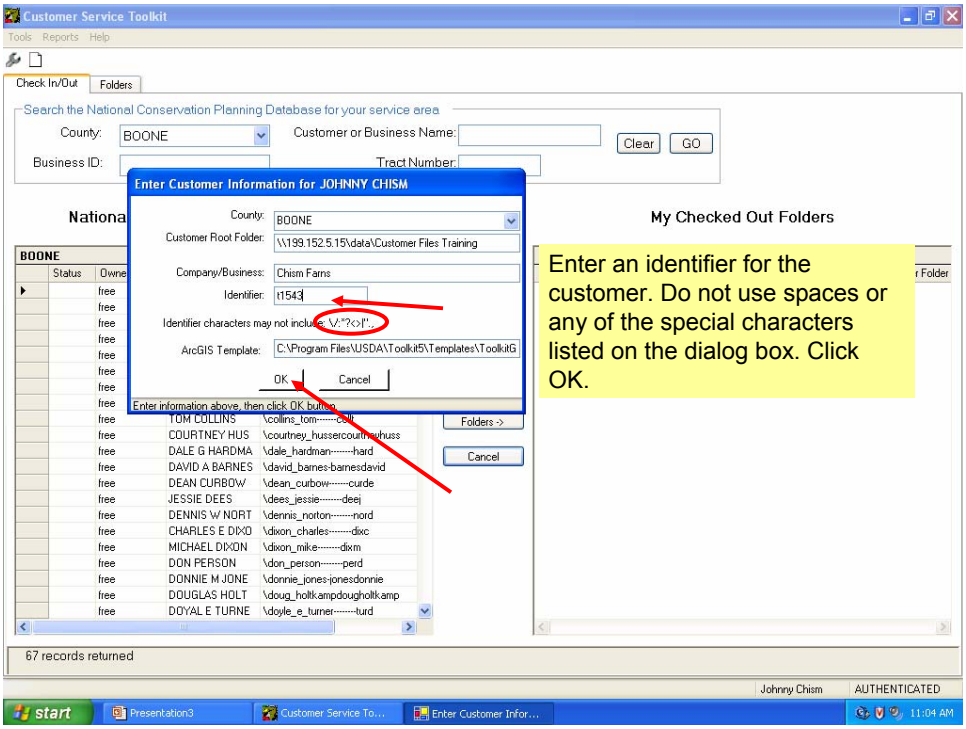
Customer folders presently in the NCPDB appear in the left window. If the customer is not present, click the Create New Customer Folder icon.

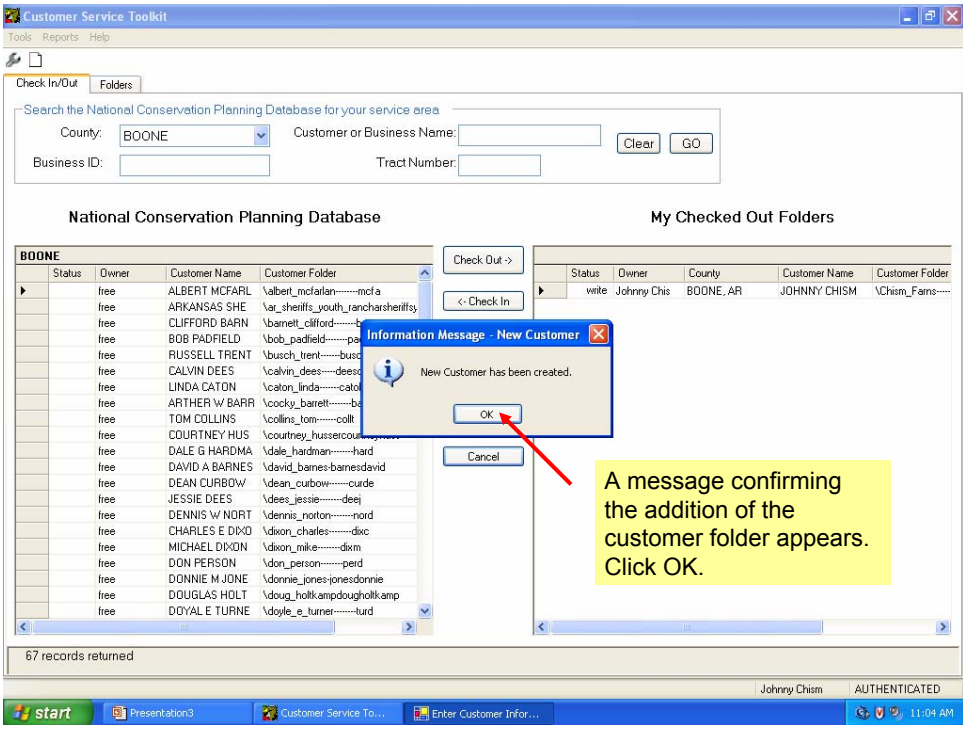


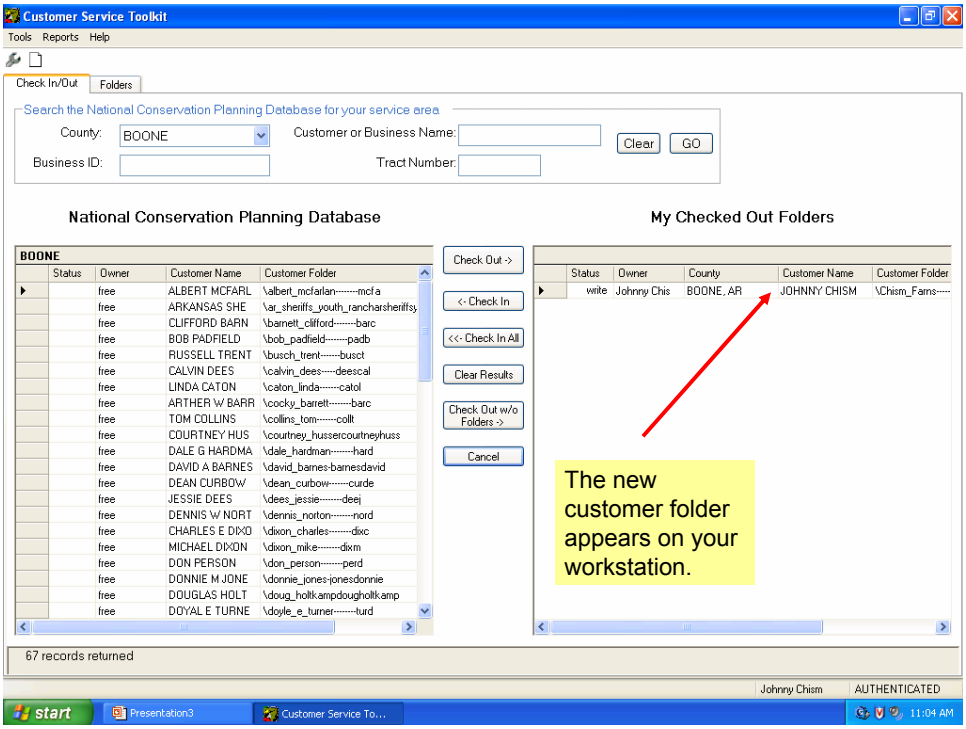
You will be taken to the SCIMS application to select the customer. Note: if you are not already authenticated through WebCAAF you will have to enter your WebCAAF credentials. Enter information about the customer to search the SCIMS database. If the customer has not been added to SCIMS, you will have to go to SCIMS to enter the customer information.


SCIMS Browser
USDA Service Center
Information Management System
Search Results
Based on selected Servicing Site HARRISON SERVICE CENTER
Select a customer:
Common Name
Tax Id
Tax Id Type
Delivery Address Line
City, State ZIP Code
Phone No
Legacy State
Legacy County
JOHNNY CHISM
Social Security
HARRISON,AR 72601-1851
(870)741-8600
Page 1 of 1
Search Again
End
Once the customer is found in SCIMS, the information will display on the screen. Click on the customer's name.
Folders
Customer Name
Customer Folder
AUTHENTICATED
start
Presentation3
Customer Service To...
SCIMS Browser
11:02 AM


Customer Service Toolkit
Tools Reports Help
Check In/Out
Folders
Search the National Conservation Planning Database for your service area
County: BOONE
Customer or Business Name:
Business ID:
Tract Number:
Clear
GO
Enter Customer Information for JOHNNY CHISM
County: BOONE
Customer Root Folder: \\199.152.5.15\data\Customer Files Training
Company/Business:
Identifier:
Identifier characters may not include: \/:*?<>|",
ArcGIS Template: C:\Program Files\USDA\Toolkit5\Templates\ToolkitG
OK
Cancel
Enter information above, then click OK button
Enter the name of the business.
My Checked Out Folders
BOONE
Status
Owner
County
Customer Name
Customer Folder
Folders ->
Cancel
67 records returned
Johnny Chism
AUTHENTICATED
start
Presentation3
Customer Service To...
Enter Customer Infor...
11:03 AM


Customer Service Toolkit
Tools Reports Help
Check In/Out
Folders
Search the National Conservation Planning Database for your service area
County: BOONE
Customer or Business Name:
Business ID:
Tract Number:
Clear
GO
Enter Customer Information for JOHNNY CHISM
County: BOONE
Customer Root Folder: \\199.152.5.15\data\Customer Files Training
Company/Business: Chism Farns
Identifier: t1543
Identifier characters may not include: \/:*?<>|"..
ArcGIS Template: C:\Program Files\USDA\Toolkit5\Templates\ToolkitG
OK
Cancel
Enter information above, then click OK button
My Checked Out Folders
Folders ->
Cancel
Enter an identifier for the customer. Do not use spaces or any of the special characters listed on the dialog box. Click OK.
67 records returned
Johnny Chism
AUTHENTICATED
start
Presentation3
Customer Service To...
Enter Customer Infor...
11:04 AM


Customer Service Toolkit
Tools Reports Help
Check In/Out
Folders
Search the National Conservation Planning Database for your service area
County: BOONE
Customer or Business Name:
Business ID:
Tract Number:
Clear
GO
National Conservation Planning Database
My Checked Out Folders
Check Out ->
<- Check In
Cancel
Information Message - New Customer
New Customer has been created.
OK
A message confirming the addition of the customer folder appears. Click OK.
67 records returned
Johnny Chism
AUTHENTICATED
start
Presentation3
Customer Service To...
Enter Customer Infor...
11:04 AM


Customer Service Toolkit
Tools Reports Help
Check In/Out
Folders
Search the National Conservation Planning Database for your service area
County: BOONE
Customer or Business Name:
Clear
GO
Business ID:
Tract Number:
National Conservation Planning Database
My Checked Out Folders
BOONE
Check Out ->
<- Check In
<<- Check In All
Clear Results
Check Out w/o Folders ->
Cancel
The new customer folder appears on your workstation.
67 records returned
Johnny Chism
AUTHENTICATED
start
Presentation3
Customer Service To...
11:04 AM